

EXHIBIT G



LEGALTECH®

An ALM Event



FREE REPORT:
Reducing Complexity,
Costs of Legal
Research Crucial
to Law Firms'
Long-Term Success

[DOWNLOAD NOW >](#)



THOMSON REUTERS



LEGALTECH



Tweet Tweet
with LegalTech



VIRTUAL LEGALTECH
The Most Important
Legal Technology
Event Online



**Top 10 Social
Networking
Tips**



Home CLECenter.com ALM Events Virtual LegalTech To Exhibit About Us Contact Us

LEGALTECH® NEW YORK 2012 - January 30 - February 1, 2012

January 30

- EVENT BROCHURE
- EVENT PROGRAM GUIDE
- CONFERENCE SCHEDULE

- January 30
- February 1

- SPONSORS
- EXHIBITOR LIST
- HOTEL INFORMATION
- RATES
- FAQ
- CLE FAQ

Newsletter Sign Up

Share this site

- Advisory Boards
- EDUCATIONAL
- VENDOR

- Legal Events
- ALL LEGAL EVENTS

To help make you LegalTech experience more enjoyable and as easy as possible we are now including icons on the program agenda. LegalTech has carefully constructed the tracks of education to offer something to each and every portion of the market.

Legal - Sessions are geared towards lawyers who need advance legal topics or more introductory technology topics.

Technology - Sessions are geared towards attendees who generally provide support to attorneys and have advanced technology understanding but are looking for greater understanding of legal topics.

General - Sessions are geared towards the overall LegalTech audience and provide content that is approachable to all attendees no matter their skill level or length of experience in the industry.

Tracks

RC Risk & Compliance - Leading Practices in Information Management	IM Information Management	TV Tech Value	LLT Leveraging Legal Technology	CLD Corporate Law Departments: Unique eDiscovery Challenges Facing In-House Counsel	AIT Advanced IT	ETA Emerging Technology - OPEN TO ALL	SS Super Sessions - OPEN TO ALL
--	---------------------------------	------------------	---------------------------------------	--	--------------------	--	---------------------------------------

Rendezvous Ballroom	Nassau A&B Suite	Sutton South/ Regent	Beckman/Sutton North	Trancon Ballroom	Mercury Suite	Sutton Center Parlor	
							

9:00 - 10:00 AM

Day One Keynote Presentation - OPEN TO ALL

Ethical Business in a Global Economy: Preventing Corruption and Bribery

Room: West Grand Ballroom



John Frank
VP, Deputy General Counsel & Chief of Staff, Office of the General Counsel
Microsoft Corporation

Sponsored by:



Exhibit Hall Break

10:00 - 10:30 AM
10:30 - 11:45 AM

RC1: IM1: TV1: LLT1: CLD1: AIT1: ETA1: SS1

Standardizing Processes for Discovery Cost Management - An ROI Your GC Can Appreciate
 Speakers: Kim-An Hernandez, Senior Counsel, International Paper
 Anthony Knaepen, Manager, Litigation Discovery, Chevron Corporation
 Meagan Thwaites, Counsel-CRM Legal Department, Boston Scientific Corporation
 Moderator: Kelli Brooks, National Partner-in-Charge, Evidence and Discovery Management, KPMG LLP

Managing Multiple Channels and Pervasive Access
 Speakers: Tain C. Duke-Richardet, Director, Regulatory, Markets, LLC
 Joe Steffan, Executive Director - Regulatory, Morgan Stanley
 Moderator: George Triahanas, Global Head, Legal Solutions, Autonomy

Global Trends in Law and Regulatory - an Analysis and Roundtable Discussion
 Speakers: John Barrow, Law Practice Manager, Angen Inc.
 Donna Sayle, Founder, Law Practice Strategy
 David Sorenson, Partner, Hinshaw Culbertson
 Moderator: Steve Mann, RLS Marketing and Law Schools, LexisNexis

Profitability Through Project Management
 Speakers: Nathan Bowles, Managing Director, Thomson Reuters Engage
 Colleen Nhilli, Firm Wide Director of Project Management, Dechert LLP

Top Five Ethical Concerns for Lawyers in eDiscovery
 Panel: Ruth Hauswirth, Director of Litigation and eDiscovery, Cooley LLP
 Courtney Barton, Assistant General Counsel, AOL
 M. James Daley, Daley & Fay LLP
 Nicholas Jafariel, Managing Director & Associate General Counsel, Saline Mae
 Moderator: Maureen O'Neill, Vice President of Discovery Strategy, LLC

iLove for the iPad: Tips, Tricks & Apps
 Speakers: Brett Burney, Burney Consultants
 David Neenan, Chief Information Officer, Greenberg Glusker & Shearman & Sterling
 Mechtlinger LLP

The Convergence of eDiscovery and Information Governance
 ETA2:
 Clearwell
 9am-5pm
 Room: Petit Ballroom
 Session A:
 10:00am - 11:00am
 Getting Beyond Smoke and Mirrors: Using Proactive Information Governance to Address the Challenges of eDiscovery, Information Security and Data Privacy
 Session B:
 11:30am - 12:30pm
 When IT Departments Go Rogue - eDiscovery and Cloud Computing
 Session C:
 12:45pm - 1:30pm
 Clearwell & Symantec - How the Leaders in Archiving and eDiscovery Are Continuing to Innovate
 Session D:
 2:00pm - 3:00pm
 Money Never Sleeps and Neither Does Social Media: FINRA's View is the Future
 Session E:
 3:30pm - 4:30pm
 An Army of One - Can One Attorney Do the Work of 500 With Predictive Coding Technology?

Man Vs. Machine: The Promise/Challenge of Predictive Coding and Other Disruptive Technologies - OPEN TO ALL
 Plenary General Session:
 11:45 - 12:30 PM
 12:30 - 1:30 PM
 Room: Wait Grand Ballroom
 Speakers: Ralph C. Losky, Partner and National eDiscovery Manager, Jackson Lewis, LLP
 Maura R. Grossman, Counsel, Wachtell, Lipton, Rosen & Katz
 Moderator: Dean Gonsowski, eDiscovery Counsel, a Symantec

Exhibit Hall Break
 ETA3:
 reputation.com
 1:30-2:15
 Above the Law: Online Reputation Risk Management Tips and Technology You Need to Safeguard Your Clients
 ETA4:
 Accellion
 2:45-3:30
 Protecting Legal Documents in an Increasingly Mobile World
 ETA5:
 RECOMMAND
 3:45-4:30
 Predictive Coding in the Fortune 500
 The Honorable Andrew J. Beck, Retiree, United States District Court for the Southern District of New York

SS2
 IKCura
 collaborative discovery™
 9am-5pm
 Room: Lower Level Concourse A
 Relativity Hands-On Lab
 SS3
 Lewis & Clark Microsoft Office
 1:30pm-4:15pm
 Room: Lower Level Concourse G
 Leveraging Technology to Drive Efficiency in Everyday Legal Research

Symantec

555



ERNST & YOUNG
Quality In Everything We Do

David Michel, Chief
Information Officer, Burr
& Forman

Moderator:
Marcus Bluestein,
Chief Technology Officer,
Kraft & Kennedy, Inc.

Session A:
10:45am - 12:30pm
**Social Media: Impact on
eDiscovery and
Electronic Evidence and
Implications for
Corporate Policy**

Session B:
2:00pm - 3:15pm
Progressive Review


Session C:
3:45pm - 5:00pm
**Top 10 Trends for 2012
and Beyond**

5:00

Welcome Cocktail Reception

Note: Must be a paid conference attendee or have a Kroll Ontrack VIP ticket to attend.

Sponsored by:

 **Kroll Ontrack**

Day One Keynote General Session Presentation: Ethical Business in a Global Economy: Preventing Corruption and Bribery [Top]

Prosecutors and corporations rank the US Foreign Corrupt Practices Act, the UK Bribery Act and the OECD Anti-Bribery Convention as top compliance priorities. In this session, John Frank, Vice President, Deputy General Counsel and Chief of Staff at Microsoft Legal and Corporate Affairs, will discuss the challenges and opportunities of building effective compliance programs to prevent and detect corrupt payments in a global business. Creating solutions that combine technology, ethics, culture and business process requires new skills and new approaches that are essential to success in our global economy.

Man vs. Machine: The Promise/Challenge of Predictive Coding and Other Disruptive Technologies [Top]

In 2012, emerging, disruptive technologies are showing great promise for the legal field, specifically in the areas of classification, retention, and review. As technology begins to understand the context of information and apply it to the nuances of legal decisions in a way once exclusively reserved for the human practitioner, one must examine how technology will change the legal practices of today. This session will examine predictive coding as a case study of how disruptive technologies have both great promise and legitimate challenges in the legal industry.

- In one corner is the human document review process. While well-established it's also now clear that the eyes-on methodology can have significant drawbacks both in cost and accuracy. In the other corner, a range of artificial intelligence technologies have shown promise in enabling enhanced precision and recall through a range of Technology Assisted Review (TAR) features such as email threading, clustering, concept search and predictive coding. And yet, despite the buzz they haven't gained widespread adoption.
 - o In this general session, vocal Jurist and U.S. Magistrate Judge for the Southern District of New York, Andrew Peck, leads a panel of industry experts that will discuss a range of hot topics including:
 - o How defensible are these TAR techniques and do they merely need to be more accurate than an average human document reviewer?
 - o Are certain use cases (like internal investigations and governmental inquiries) better suited for the use of TAR tools?
 - o How does the role of attorneys change in a TAR workflow?

Risk & Compliance – Leading Practices in Information Management [Top]

Search and retrieval technologies have evolved considerably in the last few years. With these advances, patterns can be teased out from terabytes of data, and "noise" can be significantly reduced, if not eliminated altogether. In an increasingly precise manner, the idea of "machine learning" is based on the underlying principle that sophisticated search and retrieval algorithms can learn and adapt based on review decisions made by human reviewers. This session will address the challenges of the software system as "potentially responsive," would then be reviewed by humans, starting with those ranked as most likely relevant. This series of presentations will explore and describe the standardization of these business processes, the validation of the process, and case studies to exemplify the efficacy of Software Assisted Review.

RC1: Standardizing Processes for Discovery Management and Cost Management – A ROI Your GC Can Appreciate

Given the significant potential expense of eDiscovery, in-house and outside counsel must understand the eDiscovery process in the context of not only legal compliance and the current matter, but also in the context of financial impact/cost. In short, the eDiscovery process must be understood, managed, and controlled judiciously. This panel will address the standards of eDiscovery accountability, efficiency and effectiveness and explain how a repeatable business process applied in the context of eDiscovery can ensure that your future eDiscovery processes are treated just like any other critical business process.

RC2: eDiscovery Process Validation Sampling – How Confident Can You be in the Results of Your Software Assisted/Predictive Coding Process?

The increasing volume and complexity of electronically stored information and the cost of its review continues to drive the need for development of sophisticated, high-speed processing, indexing and categorization or "predictive coding" methodologies to manage and control the review process. Since the majority of these tools rely on sophisticated, proprietary algorithms that are frequently referred to as "black box" technologies, there has been a reluctance to exploit their expected productivity gains for fear that the results they produce may be challenged and rejected as not meeting the required standard of "reasonableness." Effective use of sampling can overcome this concern by demonstrating with a stated level of confidence that the system has produced results at least as consistent and reliable as those obtained by having attorneys review the documents without sophisticated technology support. This panel will cover testing, based on statistical sampling, the quality improvements and cost savings promised by "predictive coding" technology.

RC3: More Predictive than Ever -- Predictive Coding, Predictive Costs and Predictive Outcomes – New Techniques to Manage and Control Electronic Discovery

Judge Andrew Peck cast 2011 as the year of predictive coding. A year on, where do we stand? Predictive coding is part of a paradigm shift in electronic discovery, as practitioners leverage technology and new business practices to regain control of the eDiscovery business process. Using case studies, the panelists will review some of the dramatic changes that are emerging in the conduct of eDiscovery. Sound predictive coding is fundamental to these changes. Other key changes include process transparency, early learning, rebalancing this outsourcing-insourcing mix, stratified review and statistically-driven quality assurance. Following Judge Peck, the panel will explore how predictive coding and emerging related business practices can be used to "secure the fit, speed, and inexpensive" (Fed. R. Civ. P. 1) determination of cases in our eDiscovery world."

Information Management [Top]

Lawyers face increasing challenges in the form of new and revised rules, regulations, and ever more stringent standards arising from case law. In addition, inside and outside counsel must deal with reduced budgets, a massive increase in the volume and complexity of electronic content, and increased levels of litigation and investigation. Technology can assist counsel in managing e-discovery, litigation costs, and reduce risks through a systemized, repeatable, and defensible manner that is in compliance with the various rules and regulations they will face. During this information management educational track, we will explore current challenges and present opportunities to effectively mitigate the risk inherent in electronically stored information.

IM1: Managing Multiple Channels and Pervasive Access

Beyond documents and email, there has been an explosion of varied data types: audio and video, instant messages, and social media. The realities of a constantly connected world create new forms of interactions, and add greater complexity. Employees, partners and customers access information and conduct business using multiple devices and many channels. New interaction types and channels all lead to the need for new information governance strategies, as regulations and lawyers focus more on the actual content of business interactions versus the form they take. During this session, we will explore new ways to increase information control and visibility, while keeping pace with growing amounts of information used, processed, and stored.

IM2: Sleeping Soundly with Secure Data

A recent industry poll of global CIOs in law firms overwhelmingly pointed to information security as their number one data concern and what keeps them awake at night. From insider trading to WikiLeaks, client audits and more stringent outside counsel guidelines, law firms require tools to monitor their data in real-time. During this session, we will explore how organizations can look beyond ACL rights to address data at rest and in motion, in order to safeguard client data and protect the organization.

IM3: Information Governance in the Cloud

More companies are opting for cloud-based solutions to meet their most stringent privacy and security requirements for archiving, e-discovery, compliance, records management, and data protection. Cloud computing can provide new levels of collaboration, agility, speed, and cost savings for enterprises of any size and type. During this session, we will discuss how the shift from on-premise software to on-demand, cloud-based solutions enables organizations to lower costs and mitigate risk, while defensibly enforcing comprehensive information governance (IG) enterprise-wide.

Tech Value [Top]

Technology is altering the legal playing field at a rapid rate. While there are inherent risks to firms and clients, using these solutions strategically can open new opportunities for firms and their clients. Learn about both big picture trends in law and technology, as well as analyze on a micro level the cloud, social media, juries and ethical dilemmas that accompany them.

TV1: Global Trends in Law and Technology –an Analysis and Roundtable Discussion

The legal industry is undergoing a transformation due to the rapid increase in technological advances. All aspects of the legal community are influenced – delivery of services to clients, billing, research, discovery, compliance, business development and training. New levels of risk are apparent for both firms and their clients – mitigation of these risks is essential for strategy and planning. Analysis and strategic use of the trends, tools and risks can open doors for firms to successfully compete in the global legal marketplace. A diverse panel will discuss the uncertainties, forces and paradigms that are revolutionizing the way that law is practiced.

TV2: Ethical Cloud Computing and Data Hosting

Law firms of all sizes benefit from the advent of cloud computing and data hosting technologies. They provide enormous cost-saving advantages and encourage increased client engagement. They provide better opportunities for backing up and storing vital information. However, clouds and hosting services also raise a number of ethical questions related to cost sharing and confidentiality. Join our panel for a discussion of best practices for this emerging new way to work.

TV3: Jury Trials in The New Social Media Universe

"Thanks to the social media explosion people are saying things about themselves publicly it an unprecedented pace. They also are connecting in ways unheard of just 10 years ago. How can this trend be used to your advantage? What are the best practices? What are some of the lessons learned – often the hard way? Our panel will discuss:

- What you need to know about social media
 - Understanding the depth and breadth of the new universe (so many people don't understand the prevalence)
- How social media is impacting jury trials
 - Mistrials, mistrials—why?
- What does, "Don't talk about the case," really mean? It depends on who you are talking to!
 - Hampering the benefits of social media to help you
 - Legal malpractice and beyond
 - Ethical issues

Leveraging Legal Technology [Top]

In today's legal landscape, the challenges and concerns around managing your firm have changed. Exploring new methods and techniques to run your firm more efficiently can mean the difference in stronger client relationships, prosperity and an edge on your competitors. This track of education will focus on the latest options and methods for running the best firm you can.

LLT1: Profitability Through Project Management

As clients increasingly demand precise matter budgets, fixed or alternative fees, and more transparency into outside counsel policies and practices, more and more firms are applying the principles of Project Management not only to conduct the matter, but to actually sell the work in the first place. Please join our educational panel to learn how your firm can benefit.

LLT2: Reporting Metrics & Benchmarking

Changes in the legal industry over the past several years continue to drive the need for improved reporting metrics and benchmarking in firms. This includes better use of traditional performance metrics and consideration for new metrics that may be required in the coming years to respond to an emerging operating environment. Attend this session to hear better ways to use traditional reporting metrics and learn about emerging metrics that may be required in years to come. The panel will also discuss the most effective reporting metrics and benchmarking tools that they use to improve efficiency and profitability.

LLT3: Best Practices in Microsoft Office Utilization for Law Firms

Microsoft Office is the primary software application of any lawyer- it is the first thing they log into in the morning, and last thing they log out of at the end of the day. Shouldn't law firms be looking to build more functionality into Office, rather

than conferring to offer other places lawyers have to go to do important things? Learn the difference between applications that are merely "present" in Office, and those that are truly embedded and integral, and discuss some of the technology options Office now provides.

Corporate Law Departments: Unique eDiscovery Challenges Facing In-House Counsel [Top]

For the corporate counsel, e-discovery raises a host of issues and concerns. This track of education highlights the discovery challenges specific to the corporate law department. The panels pull together the best minds of the industry to address the top issues and concerns facing in-house counsel during discovery including ethics, managing risks while controlling costs and leveraging technology responsibly.

CLD1: Top Five Ethical Concerns for Lawyers in eDiscovery

This panel will address how lawyers can recognize and comply with their ethical obligations while:

- Carrying out and supervising the duty to preserve relevant ESI
- Meeting and conferring on eDiscovery issues with the appropriate level of transparency and cooperation
- Managing the processing, review, and production of large volumes of documents and information
- Employing sophisticated eDiscovery software tools and processes
- Accessing and using information from social media sites in discovery

CLD2: Understanding Automated Review— Utilizing Predictive Coding as Part of Your Comprehensive Discovery Process

For more than two years, there has been an avalanche of commentary predicting how automated review and predictive coding tools can and will be used to supplement or replace current eDiscovery processes. Despite all of the buzz, relatively few corporations and law firms have taken the plunge into automated review. This reluctance may be based on the wide variety of service offerings and technologies that are being marketed as "automated" review tools, as well as a lack of transparency into how automated tools operate as part of a larger eDiscovery strategy.

During this session, leading practitioners and in-house counsel will demystify automated review. Key discussion points will include:

- An overview of the automated review and predictive coding landscape
- How to blend traditional manual document review with automated review options
- Practical approaches to automating the review process
- Snapshots into how leading companies are using automated review as part of their existing discovery processes

CLD3: Evolution of eDiscovery Decisions in Financial Services

In the past, financial services eDiscovery cases and regulatory settlements focused on failure to retain records pursuant to the SEC, or the inability to access those records and produce them in a reasonable amount of time. Adverse inferences in *Zubulake* and *Coleman v. Morgan Stanley* come to mind, as well as widely publicized settlements between financial services companies and regulators. Join us for a lively discussion of the following topics:

- What should you anticipate in terms of future challenges with eDiscovery?
- Are you prepared for discovery related to audio files and social media?
- What can we anticipate, if anything, from the impact of its impact on your eDiscovery process?
- Will automated review reduce the burden on you or your clients, or will financial services litigants and regulators reject efforts to incorporate automated solutions into the eDiscovery process?

Advanced IT [Top]

In conjunction with IUTA, the Advanced IT track will include cutting edge presentations on legal technology best practices and strategies that industry leaders have found to be successful in their firms. You'll learn how the iPad can benefit legal professionals, and take away a long list of valuable iPad apps for legal. You'll join the discussion around how to talk technology to lawyers and you'll hear about the six new technologies you should know about (mobile and home video conferencing, near field communications, next generation VPNs, data consolidation and cloud strategies and video conferencing beyond the conference room).

AIT: I Love the iPad: Tips, Tricks & Apps

The iPad has become an incredible mobile tool for lawyers, but it can often be a challenge for IT departments. But there's no denying the fact that the iPad is becoming part of the contemporary legal technology tool belt. In the first part of this session, we'll explore how the iPad can be integrated into a law practice and discuss security, infrastructure and compatibility. In the second part of this session, we'll go into "app-overload" and cover legal apps, note-taking apps, signature apps, PDF apps, office apps and even some fun apps. This session is for everyone that needs to learn more about how the iPad can benefit legal professionals.

AIT2: Talking Technology to Lawyers

Attend this session to understand how the most successful technology leaders communicate with lawyers about technology strategy. Hear how these CIOs have been able to innovate with technology by gaining firm management and engaging lawyers in the value technology brings to their practice.

AIT3: Six New Technologies You Should Know About

In this interactive session, IT leaders and technologists present a rapid-fire discussion and answer audience questions about six new technologies important for law firm IT operations. Topics include "The Role of the Cloud in Your DR/BC Planning", "Expansion of Video Conferencing Beyond the Conference Room", "Next Generation VPNs", "Riveted Data Consolidation and Cloud Strategies" and "Lync 2010 Experiences".

Emerging Technology - Open to All[Top]

ETA1: The Convergence of eDiscovery and Information Governance

With so much unstructured information in electronic storage containers such as email, SharePoint, file shares, social media, cloud applications and more, all in their own proprietary formats, it's obvious that the risks of not knowing what's going on in your organization is growing every day. Organizations can apply the lessons learned from eDiscovery to accelerate their path towards a sophisticated information governance framework. The need to proactively identify risks across your organization including inappropriate behavior, security and fraud concerns, as well as breaches around regulatory and policy compliance has never been more critical. Join thought leaders in the industry for a thought-provoking discussion about the convergence of eDiscovery and information governance looking at the past, present and future.

Topics to be discussed:

- How will eDiscovery practice change to increase focus on Information Governance between now and 2015?
- How will the judiciary's expectations change?
- What will clients expect from their in-house counsel, law firms and litigation support partners?
- What role does technology play in advancing Information Governance?
- How can legal professionals lead their clients and colleagues to the best outcomes?

Moderators:
Chris Dale, The e-Disclosure Information Project

Speakers:

- Craig Ball, Attorney and Forensic Technologist
- David Cohen, President, Cyberlaw Center
- Stephen Stewart, Chief Technology Officer, Nux

ETA2: Driven Breaching the Barriers to Adoption

A CLE-accredited presentation and panel discussion on the primary barriers – logistical, technological, and legal – that keep attorneys from employing the most advanced analytical tools available for the completion of their electronic discovery projects and how those barriers can be overcome.

Moderator:

Matthew A. Verga, Esq.,
Director of Consulting
Driven Inc.

Panelists:

William W. Belt, Jr., Esq.,
Team Leader of the Discovery Solutions Practice Team
LeClairRyan

John Hertel

Vice President of Product Solutions
Content Analyst Company, LLC

Robert B. "Barry" Wiggins, Esq.

Director, Forensic & Dispute Services
Deloitte Financial Advisory Services LLP

ETA3: Above the Law: Online Reputation Risk & the Tools, Tips and Technology You Need to Safeguard Your Clients

"I saw it online so it must be true." "...Privacy is dead." "...If it's on the Internet, it can never be erased."
Sound familiar? These are just a few of the Internet myths that people believe when, in fact, we can protect our online reputations. Come find out how companies and individuals are handling online image control, crisis management, and preventative reputation defense. Reputation.com will lead the discussion on why Online Reputation Management (ORM) is a critical component of your clients' (and legal practices') strategy and how you can help them establish, protect, and defend their online reputations.

During this presentation, Reputation.com will discuss:

- The factors that make up an online reputation
- The major risks to online reputation
- How to mitigate online reputation risk for your clients
- How to proactively combat attacks on one's online reputation

Speaker:

Brent Franson, Sr. Director of Advanced Client Solutions, Reputation.com

ETA4: Protecting Legal Documents in an Increasingly Mobile World

The increasing use of personal mobile devices and easy access to free cloud-based applications has introduced new data security vulnerabilities for law firms. Lawyers and legal support teams are putting confidential information at risk with the increasing use of free, dropbox-type of applications to share files with clients and outside partners. The use of consumer-grade, unmanaged cloud-based file sharing applications exposes law firms without providing adequate information security measures or visibility to ensure confidentiality and compliance.

Law firms need to critically evaluate their file sharing systems in order to protect digital information for litigation support, e-discovery, depositions, contracts, court filings, exhibits, and legal briefs.

Attend this session to learn the challenges facing the legal industry in this increasing mobile world and how leading law firms are addressing the issues.

Speaker:

Paula Skokowski, VP of Products and Marketing, Accellion

ETA5: Predictive Coding in the Fortune 500

Abstract: Predictive Coding is the hottest topic in eDiscovery due to its massive efficiency and accuracy gains. But what most don't realize is the primary drivers behind this revolutionary approach have been inside counsel looking to "bend the cost curve" of eDiscovery. In this session, we'll hear the client's perspective about Predictive Coding from in-house counsel at Fortune 500 leaders like Google, Raytheon and Nationwide Insurance.

Moderator:

Craig Carpenter, VP & General Counsel, Recommind

Speakers:

Mira Edelman, Discovery Counsel, Google
Raytheon, eDiscovery
Woods Abbott, Senior Manager of Legal Operations/eDiscovery, Raytheon

Super Sessions - Open to All[Top]

SS1: Clearwell

Session A:
10:00am – 11:00am

Getting Beyond Smoke and Mirrors: Using Proactive Information Governance to Address the Challenges of eDiscovery, Information Security and Data Privacy

Industry surveys consistently show that organizations which meet the challenges of information management, data security and eDiscovery typically do so with proactive information governance. This begs the question of what

your organization is doing about the increasing complexities posed by the data explosion? Our panel of experts will provide a variety of perspectives on the issues and describe how proactive governance empowered by technology can provide solutions. The discussion points will include:

- Developing retention policies that will capture communications and other pertinent information from employer and employee-owned devices;
- Creating protocols to protect sensitive business information from disclosure while also respecting the privacy rights of employees;
- Preparing an intelligent litigation response to avoid ineffective eDiscovery practices.

Please join the following information retention and eDiscovery experts for a lively discussion of these issues:

Speakers:

The Honorable David Woyack, United States Magistrate Judge, **District of Kansas**
Allison Brecher, Vice President, **Associate General Counsel for CA**
Allison Brecher, Senior Litigation Counsel and Director of Information Management & Strategy, **Marsh & McLennan Companies**
Philip Favro, eDiscovery Attorney, **Symantec Corporation**

Session B:
 11:30am – 12:30pm

When IT Departments Go Rogue – eDiscovery and Cloud Computing

The promise and momentum of cloud computing is undeniable, but what happens when the IT department goes rogue and migrates company data into the cloud without consulting the legal department? Learn what legal and practical issues organizations should consider before migrating data into the cloud and hear about recent trends for discovering ESI in the cloud. Key topics will include:

- What happens when data that was once at the IT department's fingertips now resides off-site and can't be easily accessed?
- Is ESI stored in the cloud still under the organization's possession, custody, and control for eDiscovery purposes?
- Who is responsible for retrieving ESI stored in the cloud during discovery and should organizations expect the court's leniency when their ESI cannot be easily retrieved?

Speakers:

Browning Marcan, Esq., DLA Piper, LLP
Katey Wood, top eDiscovery analyst, **Enterprise Strategy Group**
Matthew Nelson, Esq., eDiscovery Attorney, **Symantec Corporation**

Session C:
 12:45pm – 1:30pm

Clearwell & Symantec - How the Leaders in Archiving and eDiscovery Are Continuing to Innovate

Speaker:
Kurt Leafstrand, Director of Product Management, **Symantec Corporation**

Session D:
 2:00pm – 3:00pm

Money Never Sleeps and Neither Does Social Media: FINRA's View is the Future

In 2011 we reached the tipping point with 58 percent of respondents to a recent ESG survey saying they will have to manage social media applications as part of eDiscovery, more than double the 27 percent who did so in 2010. That's not only a massive increase in one year, but it also moves social media from a fringe element to a mainstream source of ESI. When asked what types of social media applications were the most relevant for eDiscovery, 79 percent of survey respondents named Facebook, followed by Twitter (64 percent) and LinkedIn (55 percent). The financial services industry is the first regulated vertical that is truly embracing the archiving of social media due to FINRA's regulations and clear guidance. We predict this will happen more and more as social media becomes the most prevalent data source.

Surprisingly, very few practitioners actually seem prepared to effectively handle social media and a recent survey by the Electronic Discovery Reference Model (EDRM) noted that: "[w]ritten policies for social media are non-existent." This will not suffice in the future as organizations are going to have to address social media usage and prepare their infrastructures for the ability to archive relevant social media. We will examine how to successfully institute a policy and technology to archive social media as well as touch on the data privacy concerns surrounding social media usage.

- Data Privacy Issues and Litigation - Lisa Sotter-Huntton and Williams & David Shonka
- Best practices for adequately preserving, collecting and processing information in a single or disparate and often ephemeral data sources- Melanie Kalember- Socialware
- The impact of the new rules of civil procedure on the discovery of social media policy- Debra Corn
- Recent case law that discusses the quickly evolving role of social media in eDiscovery- Allison Walton

Speakers:

Melanie Kalember, Vice President, **Socialware**
Lisa Sotter, Partner of the Data Privacy and Security Group, **Huntton & Williams**
David Shonka, eDiscovery Attorney, **Federal Trade Commission**
Debra Corn, **Prudential**
Allison Walton, eDiscovery Attorney, **Symantec Corporation**

Session E:
 3:30pm – 4:30pm

An Army of One – Can One Attorney Do the Work of 500 With Predictive Coding Technology?

NPR recently said that Technology Assisted Review (TAR) could let "one attorney do the work of 500." While that's likely hyperbole, new advances in TAR, particularly predictive coding, allow attorneys to better leverage these exciting new technologies. Join Shawn Cheadle, General Counsel Surveillance and Navigation Systems at Lockheed-Martin, Judge Ronald J. Hedges (ret.), Matthew Nelson, eDiscovery Counsel with Symantec, Director of Product Management for Clearwell as we explore the pros and cons of predictive coding and look at how TAR technology works in practice.

Speakers:

Shawn Cheadle, General Counsel Surveillance and Navigation Systems at Lockheed-Martin
Judge Ronald J. Hedges (Ret.)
Matthew Nelson, eDiscovery Counsel with Symantec
Kurt Leafstrand, Director of Product Management for Clearwell

SS2: kCura - Relativity Hands-On Lab

Location: Concourse A

Abstract: Experts will be available to guide you through exercises in using computer-assisted review to magnify the efforts of your case team, forecasting important review metrics, building applications to solve specific case needs, managing legal holds, and creating interactive charts to identify trends and patterns. Additionally, development partners will be on hand to demo their integrations with Relativity. No appointment is necessary.

SS3: Lexis® for Microsoft® Office

Leveraging Technological Innovation to Drive Efficiency in Everyday Legal Research Activities

As the legal economy continues to put pressure on the legal industry, organizations implement new business models and solutions designed to drive increased efficiency in their organizations. The advent of new technologies and the increased availability of digital legal research content provide leaders a vast array of solutions to address the issue. Some existing technologies remain a centerpiece of legal professionals' tasks and continue to change to meet their increasing efficiency demands.

But, with the proliferation of disparate technology products and the increased volume of legal content, attorneys often struggle to integrate all of the advances into their existing workflows. Join LexisNexis and CDW to explore how new innovations in workflow optimization tools are a natural extension of the legal research and communication activities. Learn how this integration can visibly save you time and increase the accuracy of your work while conducting common tasks such as evaluating an opponent's brief, managing email, and drafting your own work product.

1:30pm - 2:00pm

The current technology/content landscape in the legal industry

- Knowledge Management
- Matter Management
- Practice area specific solutions
- Time and Research Costs

Speaker:

Alex Dalesio, Director of Customer Discovery & Innovation, LexisNexis

2:00pm - 2:30pm

Capitalizing on advances in existing technology

- Accessing information from "anywhere"
- Customizing your experience
- Overcoming the communication overflow
- Turning data into insights

Speaker:

Lee Curtis, Microsoft Licensing Specialist, CDW

2:30pm - 2:45pm

The integration of legal research content and technology into workflow processes...an evolution

- Speed
- Collaboration
- Information access

Speaker:

Alex Dalesio, Director of Customer Discovery & Innovation, LexisNexis

3:00pm - 4:15pm

Leveraging new workflow technologies to drive efficiency in the practice of law

- Evaluating an opponent's brief
- Managing email
- Drafting your own work product

Speaker:

Alex Dalesio, Director of Customer Discovery & Innovation, LexisNexis

SS4: Microsoft

Microsoft is committed to developing technologies that provide law firms and legal departments with low cost alternatives to traditional DMS systems. For our 2012 LegalTech Super Session, we've brought together experts from Microsoft and the legal industry's top 500 Certified Business Partners to showcase the exciting innovations in information management solutions that streamline your work and lower your short- and long-term cost of ownership.

Keynote Address

Microsoft

John Frank

Session A:

10:00 - 11:00am

Microsoft - Practical Practice Technologies: Constructing Seamless Legal Services

Microsoft, Legal and Corporate Affairs.

Technology is an enabler, not an impediment, to the practice of law. See how Microsoft's legal department is architecting cross-platform solutions—across mobile phones and slate computers, unified communications and best-in-class collaboration software—focused on building a seamless environment for Microsoft lawyers to engage in their client work. The challenge is not the technology, but the people. The challenge is to ensure that the work is foremost "in practice" technologies such as intake and workflow processes, matter management, document management, document & records management, and web content management.

Speakers:

Sheryl Nolan, Group Manager for Business & Technology Solutions, Office of the General Counsel, Microsoft
Quentin Christensen, Program Manager, SharePoint Product Team, Microsoft
Chris Anderson, Esq., Practice Strategist, Office of the General Counsel

Session B:

11:00am - 12:00pm

Using SharePoint as a Document Management System with Epona's DMS for Legal™

Epona

Many law firms that are exploring the benefits and challenges of moving their documents and e-mails to SharePoint 2010 are also facing challenges with ease of use, user adoption, and simplicity of design. As a result, firms are looking for an out-of-the-box solution that enables full integration with Microsoft Office and SharePoint. Learn about Epona's DMSforLegal, a powerful, out-of-the-box solution that seamlessly meets the expectations of legacy DMS users, provides simplicity of use, and integrates SharePoint and Office 2010.

Speaker:

Kath Vellely, US Director of Sales, Epona

Session C:

12:00 - 1:00pm

Success Factors for Legal Portals: Learnings from Microsoft's Legal Intranet Web Team

Microsoft re-engineered its legal intranet portal to allow legal professionals to redirect hundreds of thousands of high-volume, low-risk answers and resources online. By creating SharePoint plug-and-play templates and applying key principles of information design, the department achieved amazing results in productivity and client satisfaction. Learn the success factors and practical tips you can immediately use in building or optimizing your own web presence.

- Creating plug-and-play templates for easy authoring of elegant, interactive webpages
- 5 information design principles that transformed the site
- Patients' team before and after: see how the site redesign solved their biggest pain points, and took client response time from 2 weeks to 2 minutes – while tripling traffic to the site

Speaker:

Jackie Smith, Senior Content Manager, **Microsoft Corporation**

Session D:

1:00 – 2:00pm

Using SharePoint-based DM Solutions to Meet Legal Needs

MacroView

This presentation explores how the MacroView Document Management Framework (DMF) enables the successful deployment of document management solutions on SharePoint 2010. We will review the use of MacroView DMF at Winston Strawn, specifically how MacroView DMF customized the Microsoft Word environment to match the capabilities of the firm's previous "traditional" DM system.

Speakers:

Noel Williams, CEO, MacroView

James Hoare, Vice-President, Client Services, MacroView

Session E:

2:00 – 3:00pm

Leveraging SharePoint and Office 2010 to Create a Robust Legal Information Management Solution

Handshake

Law firms and corporate legal departments are constantly challenged by ineffective email and document management solutions, especially their weak matter-centric or client-centric capabilities. Handshake Software explains how to use SharePoint 2010 and Office 2010 to create a firm-wide legal information management solution. Topics include client- and matter-centric intranets and extranets, search (including FAST), workflow, document and email management.

Speaker:

Doug Horton, CEO/President – Handshake Software Inc.

Session F:

3:00–4:00pm

Document Management Solutions Using SharePoint 2010

Microsoft Consulting Services

Microsoft Consulting Services in the UK has been assisting Clifford Chance with the implementation of SharePoint 2010 as their document management solution and collaboration platform. This session will provide insight to the work to date and the offering developed by MCS through its successful work at Clifford Chance.

Speakers:

Phil Norman

Gill Tharmamanthar

Session G:

4:00 – 5:00pm

Best of Breed Versus The Single Platform

Sword Group

Sword has delivered extensive SharePoint 2010-based solutions in the legal community, including document management, workflow, collaborative portals, digital marketing, websites, client extranets and migration methodologies. Find out how these solutions enable the effective transition from "best of breed" to integrated Microsoft SharePoint and Cloud platform solutions. Excalibur, a SharePoint 2010-based matter-centric document management system, will be showcased.

Speaker:

Terry Coyne, Business Unit Director, Sword Group

SSS: Ernst & Young

Session A:

10:45 am - 12:00 Noon

Social Media: Taming the risks

Adam Cohen leads a lively and informative look at Social Media as a burning issue for business enterprises of all shapes and sizes. In grappling with the legal risks associated with business and personal use of social media by employees, different policy approaches have been taken and articulated. Attendees will learn how to identify essential issues in formulating policy and examples of how to address them in policy documentation. As another form of Electronically Stored Information, Social Media is subject to preservation and discovery requirements and has now impacted litigation dynamics and the way these issues have been addressed by the courts suggests various possible outcomes. Attendees will learn about the emerging case law and its implications for the use of social media in litigation tactics.

Session B:

2:00pm – 3:15pm

How do you know when it's right? (Modern perspectives on modern discovery)

Jonathan Nystrom, leader of Ernst & Young's the Progressive Review practice group, is joined by experts in linguistics and law to cut through the hype and get to the meat of key issues in technology-assisted review. This informative session will cover all of the hot topics: the role (and limits) of sampling, leveraging predictive coding, defensibility, and costs.

Session C:

3:45 pm – 5:00 pm

Top 10 trends in eDiscovery for 2012

led by Adam Cohen and friends, this panel will explore the most significant trends going into 2012, from a practical, legal and technical perspective. Are we getting closer to a technical system that provides a truly seamless solution covering the entire information lifecycle? Will the cloud cause major problems for electronic discovery or will potential disasters be averted by careful planning and agreements? Will a preservation rule bring clarity to the murky contours of the timing and scope of the preservation duty? These and many other eDiscovery topics sure to surface in 2012 will be analyzed and explained.

